

## Applicant Instructions for SurveyMonkey Apply Rev. 3/5/2024

Welcome to SurveyMonkey Apply where you can apply for a Saltzman Foundation Grant and complete post award tasks online.

Go to <https://saltzmanfoundation.smapply.io/>

*(A link can also be found on the Saltzman Foundation page of the Jewish Federation of Southern New Jersey website.)*

\*Please use the latest version of **Chrome** as your browser. SurveyMonkey Apply does not like Safari.

On the first page of the SurveyMonkey Apply website are the dates during which the Foundation is accepting applications and when Post Award Reports are due. The submission dates for New Proposals and Renewal Proposals are broken out by Area of Impact (Population Served) and by organization name. If you are Federation/Federation agency applying for funding, please follow any Planning & Visioning requirements prior to submission.

### **STEP 1 – REGISTER (If registered, skip to step 2)**

*(Please do **NOT** register using Facebook, Twitter, or Google)*

- ⇒ Click “Register” if you are a first-time online applicant.
- ⇒ Register by providing your first name, last name, and email address.
- ⇒ Create a password, confirm password.
- ⇒ Confirm that you are not a robot.
- ⇒ Click “CREATE ACCOUNT”

- Welcome! You have successfully registered for a SurveyMonkey Apply account for the Raymond & Gertrude R. Saltzman Foundation.
  - ⇒ Please click “Continue to site.”
- Your email address has not been verified. An email was sent to you to verify your email address. [Please click “send verification link” if you did not receive this email and need it resent.]
  - ⇒ Go to your email inbox and find & open the email “RE: SurveyMonkey Apply Account Email Verification.”
  - ⇒ Click “Confirm email address.”
- SurveyMonkey Apply will say, “Thanks! Your email address is now verified.”
  - ⇒ Click “Continue.”
- You will come to the NO APPLICATIONS page.
  - ⇒ Click “View programs” and choose the program to get started.

*(A second email will be sent to you at this point. "You have successfully registered for the following site, Raymond & Gertrude R. Saltzman Foundation, as an Applicant. You will be able to click on the link provided in this email at any time to take you to your Applicant portal.")*

Skip to Step 3 of these instructions.

## **STEP 2 – LOG IN INSTRUCTIONS FOR APPLICANTS WHO ARE ALREADY REGISTERED**

*(Please do **NOT** log in using Facebook, Twitter, or Google)*

- ⇒ Click “Log In” if you already have a registered account with SurveyMonkey Apply.
- ⇒ Provide your email address and password and click “LOG IN”

If you’ve accidentally clicked the wrong option, at the top right-hand corner, you have the opportunity to do the opposite:

- Don’t have a SurveyMonkey Apply account? ⇒ Click “REGISTER”  
⇒ OR
- Already have a SurveyMonkey Apply account? ⇒ Click “LOG IN”
  
- If this is your first time submitting an application with us online, you will come to the NO APPLICATIONS page.  
⇒ Click “View programs” and choose the program to get started.  
**OR**
- If you have already submitted an application with us online, you will come to the ALL APPLICATIONS page. Any active applications will remain on this page throughout the submission, approval, and post-award processes. Once these stages are completed, they will be archived by the Foundation.  
⇒ Click “Programs” and choose the program to get started.

## **STEP 3 – APPLICATION PROCESS**

Once in the Programs section, you will click “MORE” in the Saltzman Foundation Grant Application box.

- On the next page, you have the following options:
  - ⇒ Read the Foundation’s Mission and Grant Guidelines, including the draft of the Allowable Costs Guidelines.
  - ⇒ Click “Apply” to start the application.
  
- ⇒ Next you will provide a name for your application. (The name you provide will be the **fiscal year** followed by the proposal name.) For **renewal** grants, please use the **same** name that was used previously, **updating** the fiscal year. An example of a proposal name: FY2024-2025 Test Application. The name that you provide **cannot** be changed after this step.
  - ⇒ Click “CREATE APPLICATION” once you’ve entered the name.

The next section will be your dashboard. You must complete the 3 required tasks before you will be able to review & submit:

### **Eligibility Qualifications**

- ⇒ Click on “Eligibility Qualifications” (on the right) and answer the questions in the workspace (on the right).
- ⇒ Every question must be answered in order to move on the next section.
- ⇒ Review the information you’ve provided and make sure your answers are correct because answers **CANNOT** be modified once you click “Next.”
- ⇒ Click “Next” (if everything is correct) to move to the next task.

### **Verify Charity Status**

- ⇒ Click on “Verify Charity Status” (on the left)
- ⇒ Enter your EIN# and click “VERIFY” (on the right)
  - ⇒ If the company information is correct, click “Mark as Complete” and move on to the next task.

### Application

- ⇒ Click on “Application” (on the left) and enter information in the workspace (on the right)
- ⇒ Select New or Renewal and continue. (All fields must be completed unless specified as optional.)
- ⇒ Please use format MM/YYYY – MM/YYYY when entering the Proposal Period Start – End Dates.
- ⇒ Provide requested information for your Agency/Organization, yourself, and the contact person (if not you)
- ⇒ Enter your Number of Goals, 1-3 (the form will expand depending on your entry)
- ⇒ Fill out the Goal and Metrics section(s). At least one metric per goal is required.

### Budget

- ⇒ Download the **Budget** Template (dated **3/5/2024**). You must use the latest version of the budget template, or the proposal will not be reviewed by the Foundation. Do not use earlier versions.
- ⇒ Please **rename** the Budget Template file to reflect the grant proposal name and year.
- ⇒ Complete the budget, starting with the Personnel tab. **Your grant title is entered on this tab**, it populates the other tabs.

NOTE: The **DETAILS (Names & Positions)** in the Personnel chart are NOT REQUIRED for proposals where salaries are not part of the request for support from the Saltzman Foundation, including:

- a) Scholarships (FTI, KBA, Politz, BBYO, JCC ECC, JCC Camps, Camp Gan Israel).
- b) Pass through expenses where no salaries are requested.
- c) Hourly subsidies in lieu of salaries.

In these cases, use the non-Saltzman FTE and Salary fields to provide the total FTEs and Total Salaries in your Program Budget.

- ⇒ After completing the Personnel tab, proceed to the Proposed Budget tab. Note that several fields have been auto filled from the Personnel tab.
- ⇒ RENEWAL PROPOSAL ONLY:
  - Fill in the amount AWARDED for the current year in the purple field indicated at the far right.
  - Fill in the anticipated ACTUAL current year final amounts for all budget line items in the purple fields indicated at the far right.
- ⇒ PROPOSED BUDGET (for the next fiscal year):
  - Provide a clear justification for ANY budget line item, both revenue and expenses.
  - Fill in the two blank cells in the Key Data Section indicating Proposed # of Saltzman-eligible Participants and the Proposed # Total Project Participants.
  - NOTE: If the % of Saltzman-eligible participants is LOWER than the percentage of the Total Budget that is being requested to be funded by the Saltzman Foundation, the Foundation will award the lower amount. For example, if you are requesting that the Foundation fund 70% of the budget, but only 50% of the participants are Saltzman-eligible, the Foundation will not fund more than 50% of the budget.
- ⇒ Make sure any data provided in the Budget is consistent with the information provided in the Proposal text.
- ⇒ For those applicants using a Subsidized Rate in their proposed budget, please use the template on the tab labeled OPTIONAL to explain what is included in the calculation of the rate.
- ⇒ For NEW proposals, please provide estimated Budgets for Year 2 & Year 3 on the designated tabs.
- ⇒ Upload the completed file.

- Orange field is the Grant Year and Name, it auto fills on the Budget and subsequent tabs.
- Gray fields are to be left empty.
- Green fields auto-calculate.
- Blue fields on Budget tab are auto filled by and corresponds to the Personnel Template tab
- Purple fields on Budget tab MUST be completed for Renewals only.
- Bright Yellow field (in the justification column) must be filled in if the NET is not zero.

- ⇒ Click “next” to move on to the next section.
- ⇒ Answer all questions.
- ⇒ If you are completing a New Application, Click “next” upon completion of the application.
- ⇒ If you are completing a Renewal Application, click “Mark as Complete.”

#### **STEP 4 – SUBMITTING APPLICATION**

- ⇒ Once you see that all 3 of 3 required tasks are completed (on the left),
  - ⇒ click “Review.”
- Review the information you’ve provided. If everything is correct,
  - ⇒ click “Submit Your Application.”
- To confirm your submission,
  - ⇒ click “Submit” once more.

You have successfully submitted your application.

You will receive an email stating that your application has been submitted.

- You can return to your other ongoing application(s) by going to “My Applications.”
- You can also create a new application by clicking “View More Programs.”
- If at any time, you want to start a new application, you can click “Programs” at the top of the page.

#### **STEP 5 – DECISION STAGE**

Wait for Decision email to be sent to you by the Saltzman Foundation.

### Pointers for Saltzman Foundation Applications

1. When we ask about collaboration, we are looking for you to be working with others in the community and leveraging the dollars Saltzman provides.
2. Less is more. Be succinct but make sure you are answering the question that is posed. Each question is different and should have a unique answer.
3. The application should include clearly measurable goals that are relevant to the work scope of the grant as proposed.
4. Make sure all numbers referenced in your proposal text can be matched to any numbers referenced in your budget. Verify your math everywhere.
5. If the proposal is for scholarship support, we want to see the entire program budget. Please show the funds you are requesting from Saltzman for scholarship support in the scholarship line item of your budget and show other sources of scholarship support. (Do not just fill in Request to Saltzman Foundation column, include entire program budget and show other sources of support under other columns.)
6. The dollar amount requested from Saltzman under revenue should match the total dollar amount indicated from Saltzman under expenses.
7. We should not be “filling in the bottom line” of your funding needs. Rather, the dollars provided by Saltzman should be for a specific purpose that funds a specific program and/or service.
8. Once approved, you will need to bill us in accordance with the line items requested and approved in your budget.
9. If something isn’t working or doesn’t make sense, call or email us! We are in the office Tuesdays, Wednesdays and Thursday from 9am-3pm (856) 424-6226.
10. Proofread everything before submission.
11. Please save a pdf of all submissions as well as the Grant Agreement.
12. Save the Budget for post award activities.

### **SMA Helpful Hints:**

**Collaborator(s)** If at any time you need to add a collaborator (someone else that would like to view/edit your proposal/reports along the way, log into your application and click “Add Collaborator.” Enter their email address and a message (message optional). Click “Send Invite.” Once they accept your invitation (have them check their email and follow the prompts), you have the option to change “ownership” of the grant.

**Owner** Only the owner of the grant can submit the application and post award reports. Be sure you have the right people assigned as the owner and collaborator(s).

**...** When you see these three dots (ellipsis/asterism), you can click on them for options such as download, preview, edit, reset, or delete.

**Arrow Down** When you see the arrow pointing down, that allows you to download the application to review it upon completion, prior to submitting.

If you don’t know an answer and it is a mandatory field, just put a character in it and go back and edit later.